

Cash Balance Account (CBA) Distribution Request

All distributions from your CBA are taxable unless rolled over to a qualifying retirement account. Taxes of 20% Federal and 5% State will be withheld from amounts directly paid to a member. ATRS recommends that you consult a professional tax advisor about retirement distributions before submitting this request.

Member Information

Member's Name _____	SSN _____
Mailing Address _____	
City _____	State _____ Zip _____
Telephone Number (_____) _____	Alternate Number (_____) _____

I elect the following distribution from my Cash Balance Account:

1. \$_____ To be paid directly to me net of 20% Federal and 5% State withholding taxes.
2. \$_____ To be rolled over to an eligible account at my chosen Financial Institution.
Checking and savings accounts are not eligible accounts.
Minimum rollover amount is \$200.
3. \$_____ Total distribution. (1. + 2.)
Minimum total distribution amount is \$200.

The eligibility of the rollover institution you select is subject to verification by ATRS.
A Representative from the rollover institution provides the following information.

Financial Institution _____	
Mailing Address _____	
City _____	State _____ Zip _____
Type of Account _____	Account Number _____
Contact Name (please print) _____	
Signature of Depository Trustee Representative _____	

By my signature, I authorize ATRS to make distributions from my Cash Balance Account as directed above. I understand that ATRS is required to withhold 20% Federal and 5% State income taxes from amounts not rolled over. I have reviewed the distribution options above and understand that once submitted the distribution request is irrevocable.

Member's Signature _____ Date _____

Failure to complete this application correctly will result in delay of payment.